



Transitioning Agency Checklist

Finance

#	TASK	✓
1	Review VITA's invoice handling procedures and analyze them in conjunction with agency internal procedures.	
2	Assess current agency approval procedures. Redefine as necessary to ensure that agency personnel continue to serve in appropriate roles in the process.	
3	Analyze other roles in the procurement and invoice handling processes. With potentially key personnel transitioning out of the agency, roles may need to be redefined and reassigned.	
4	Identify the VITA billing contact (AITR by default). Define the process for reconciling monthly VITA billing and the processing of payments to VITA.	
5	Review instructions for use of VITA's online Asset Inventory (AI) tool.	
6	Identify users authorized for use of the online AI system and submit list to VITA Finance Lead.	
7	Instruct all users to log on to the tool and request Pegasus IDs for access. Even if a user has a Pegasus ID for another system, a request must be sent for access to the VITA online AI tool.	
8	Review asset purchase/surplus plans or other plans affecting inventory. Evaluate impact on updating asset inventory spreadsheets and required upload completion dates.	
9	Using the agency's AI spreadsheet as a baseline, identify agency assets, both hardware and software.	
10	Coordinate to make a single upload with data from all agency locations. The tool does not recognize multiple uploads and overlays data as a result.	
11	Once assets have been modified to reflect the agency's current inventory, prepare to upload the inventory data into the tool.	
12	Upload the spreadsheets into the system 'staging' area.	
13	Validate the contents in the 'staging' area; make corrections as appropriate.	
14	Move inventory to the 'production' area in the tool.	
15	Assess internal processes for the management and maintenance of asset inventory updates.	